

Five Factors Distinguish Best-in-Class Consultants from Average Practitioners

2019 Greenwich Leaders: U.S. Investment Consulting

April 28, 2020

Executive Summary:



Greenwich Associates identified five factors that distinguish best-in-class consultants from average practitioners.

Methodology:

Between July and October 2019, Greenwich Associates conducted interviews with 1,100 individuals from 896 of the largest tax-exempt funds in the United States. These U.S.-based institutional investors are corporate and union funds, public funds, and endowment and foundation funds with either pension or investment pool assets greater than \$150 million.

Study participants were asked to provide quantitative and qualitative evaluations of their asset management and investment consulting providers, including qualitative assessments of those firms soliciting their business and detailed information on important market trends.

The data reported in this document reflect solely the views reported to Greenwich Associates by the research participants. Interviewees may be asked about their use of and demand for financial products and services and about investment practices in relevant financial markets. Greenwich Associates compiles the data received, conducts statistical analysis and reviews for presentation purposes in order to produce the final results. Unless otherwise indicated, any opinions or market observations made are strictly our own.

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